Guide for Education Planning and Results Reporting 2006-2009

Requirements for Alberta school boards and Francophone school authorities and their schools

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Alberta
EDUCATION

Guide for Education Planning and Results Reporting, 2006-2009

Requirements for Alberta school boards and francophone school authorities and their schools.

This document provides the requirements for:

- Three-year education plans for 2006-2009. These plans cover the 2006/07, 2007/08 and 2008/09 school years and are due on June 23, 2006.
- Annual Education Results Reports for the 2006/07 school year based on the three-year education plans for 2006-2009. Reports are due November 30, 2007.
- Annual Education Results Reports for the 2005/06 school year, based on the three-year education plans for 2005-2008 submitted June 24, 2005. Reports are due on November 30, 2006.

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Education Planning and Results Reporting, 2006-2009

Requirements for Alberta school boards and Francophone school authorities and their schools

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What's changed?

The primary change in the 2006 edition of the School Board Planning and Reporting Guide is incorporating the Accountability Pillar Evaluation.

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• Information previously included as appendices, such as general information and guidelines on performance measurement, target setting and conducting surveys, have been removed from the document. These are available online on the Planning Resources web page at http://www.education.gov.ab.ca/educationsystem/planning.asp	

Section

1

Background

REVISED

Section 16(2) of the *Government Accountability Act* requires organizations under the jurisdiction of government ministries to prepare business plans and annual reports for each fiscal year "in the form and at a time acceptable to the Minister." Section 78 of the *School Act* requires school boards to use accountability information and report it to students, parents and electors in a manner the minister prescribes.

School jurisdiction plans and reports align with and build on Alberta Education's vision, mission, goals and outcomes for the basic education system. In this way, these documents help ensure that the Kindergarten to Grade 12 education system is focused on key priorities that meet the educational needs of Alberta students. At the same time, jurisdiction plans and reports incorporate local goals, priorities and outcomes that reflect the unique characteristics and circumstances of their communities. In short, they reflect local needs and priorities within the context of a province-wide framework.

Accountability Framework

Accountability in the basic education system involves an ongoing performance management cycle that enables continuous improvement and critical reflection. Key components are measuring progress and using results to inform decision making. For school authorities, the cycle consists of:

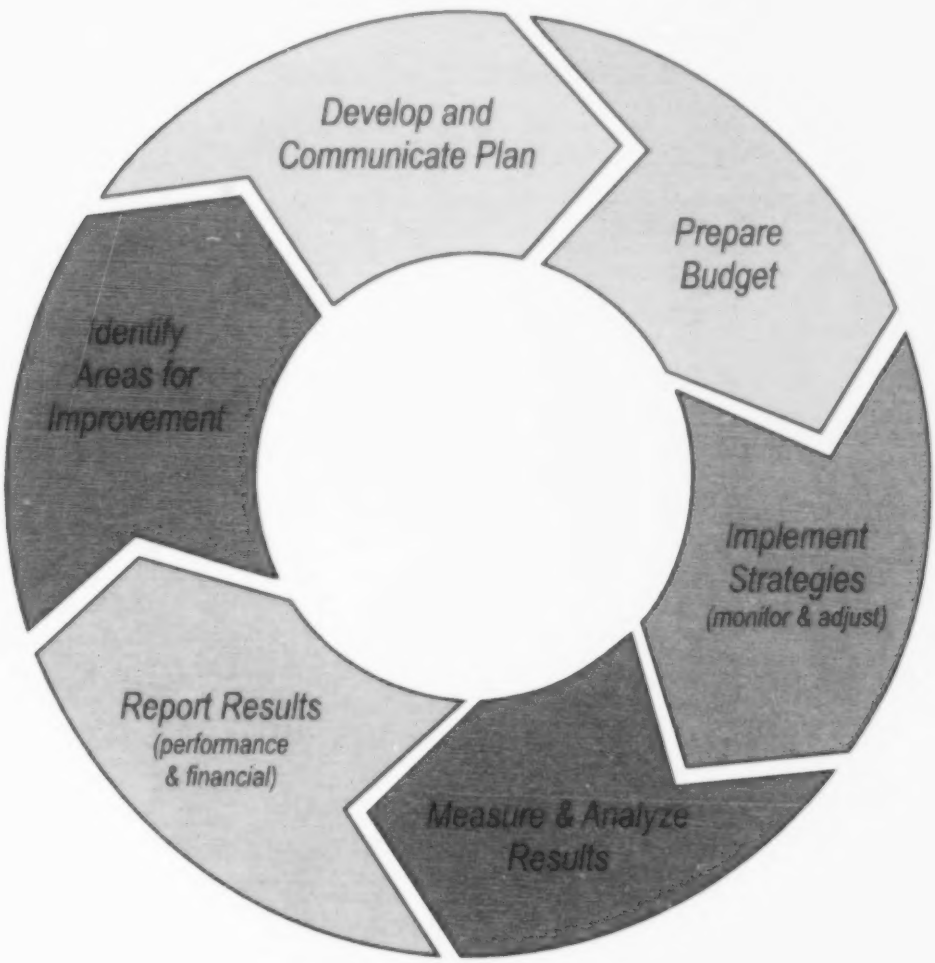
- developing plans that are aligned with provincial goals and outcomes and incorporating community input;
- preparing budgets that allocate resources to achieve goals and improve results;
- implementing strategies to improve student learning, and monitoring and adjusting as needed;
- measuring, analyzing and reporting results;

- using results to identify areas for improvement for the next plan; and
- communicating with stakeholders (staff, students, parents or guardians, school councils, the public, and Alberta Education) about school jurisdiction and school plans and results.

Performance Management Cycle for School Authority Accountability

- using results to identify areas for improvement for the next plan; and
- communicating with stakeholders (staff, students, parents or guardians, school councils, the public, and Alberta Education) about school jurisdiction and school plans and results.

Performance Management Cycle for School Authority Accountability


Develop and Communicate Plan
Prepare Budget
Implement Strategies (monitor & adjust)
Measure & Analyze Results
Report Results (performance & financial)
Identify Areas for Improvement

Accountability Pillar of the Renewed Funding Framework

Accountability for results was strengthened with the implementation of the Renewed Funding Framework for school jurisdictions, which is based on three Pillars: Flexibility, Accountability and Formulas and has the following fundamental characteristics:

- equitable distribution of funds;
- provision of maximum flexibility to facilitate local decision making; and
- public accountability for the use of resources and the results achieved.

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The Accountability Pillar places increased emphasis on achieving outcomes, reporting results and using results for informed decision making for the purpose of improving programs and student results in subsequent years. Building on the existing accountability framework, processes and practices, school boards continue to be accountable for meeting the learning needs of all students and ensuring that provincial legislation, regulations, policies, and standards are met. With the implementation of the Accountability Pillar, school jurisdiction performance is measured, evaluated and reported by comparing current results against past performance and provincial standards on a common set of measures for all jurisdictions, using a common evaluation methodology.

Development of the Accountability Pillar

NEW

Drawing on the work of the Funding Framework Review Committee and the Review Committee on Outcomes, the Accountability Pillar Design and Implementation Advisory Sub-Committee (APDIASC) has been working over two years on the Accountability Pillar. The following organizations are represented on APDIASC: Alberta School Boards Association (ASBA), College of Alberta School Superintendents (CASS), Association of School Business Officials of Alberta (ASBOA), The Alberta Teachers' Association (ATA), Alberta Home & School Councils' Association (AHSCA), Fédération des conseils scolaires francophones de l'Alberta (FCSFA).

APDIASC established the following guiding principles for the Accountability Pillar:

- transparent process
- emphasis on achievement
- holistic approach to evaluation
- on-going collaborative processes
- all jurisdictions can succeed.

Accountability Pillar Measures and Categories

NEW

APDIASC grouped the 16 Accountability Pillar measures into the following seven categories that represent key aspects of education that are important to parents and the public:

- Safe and caring schools
- Student learning opportunities
- Student learning achievement (Grades K-9)
- Student learning achievement (Grades 10-12)
- Preparation for lifelong learning, employment and citizenship
- Parental involvement
- Continuous improvement.

See page 2-5 for a list of Accountability Pillar measures by category.

Evaluation Methodology

NEW

Each measure within the set of Accountability Pillar measures is evaluated on two bases: achievement and improvement, then given an overall evaluation that combines the achievement and improvement evaluations.

The **achievement** evaluation is based on comparing the current jurisdiction result against fixed standards for each measure. This results in one of the following achievement levels:

- Very high (blue)
- High (green)
- Intermediate (yellow)
- Low (orange)

- Very low (red)

The standards for each measure are set by selecting the 5th, 25th, 75th and 95th percentiles on the distribution of all jurisdictions' baseline three-year average results.

Note: The baseline three-year average result includes a different set of years for different types of measures, depending on when three years of results are available. For test results, data for 2001/02, 2002/03 and 2003/04 are used, while data for 2000/01, 2001/02 and 2002/03 are used for student outcomes such as the drop out rate. Results for 2003/04, 2004/05 and 2005/06 will be used for the baseline three-year average for the survey measures.

The standard for each measure is fixed and is expected to be held constant for seven to ten years. Jurisdiction results on each measure are compared against these fixed standards each year. The Accountability Pillar binder distributed to school jurisdictions in January 2006 included information on the standards for each measure.

The **improvement** evaluation is based on comparing the current jurisdiction results with the prior three-year average jurisdiction result for each measure. This results in one of the following improvement levels:

- Improved significantly (blue)
- Improved (green)
- Maintained (yellow)
- Declined (orange)
- Declined significantly (red)

The evaluations of improvement and achievement are combined for the **overall** evaluation for the measure, as depicted on the table below.

Improvement	Achievement				
	Very High	High	Intermediate	Low	Very Low
Improved Significantly	Excellent	Good	Good	Good	Acceptable
Improved	Excellent	Good	Good	Acceptable	Issue
Maintained	Excellent	Good	Acceptable	Issue	Issue
Declined	Good	Acceptable	Issue	Issue	Concern
Declined Significantly	Acceptable	Issue	Issue	Concern	Concern

Similarly, each of the seven categories of measures is given an evaluation that is based on an average of the overall evaluation for each

- Very low (red)

The standards for each measure are set by selecting the 5th, 25th, 75th and 95th percentiles on the distribution of all jurisdictions' baseline three-year average results.

Note: The baseline three-year average result includes a different set of years for different types of measures, depending on when three years of results are available. For test results, data for 2001/02, 2002/03 and 2003/04 are used, while data for 2000/01, 2001/02 and 2002/03 are used for student outcomes such as the drop out rate. Results for 2003/04, 2004/05 and 2005/06 will be used for the baseline three-year average for the survey measures.

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Improved	Excellent	Good	Good	Acceptable	Issue
Maintained	Excellent	Good	Acceptable	Issue	Issue
Declined	Good	Acceptable	Issue	Issue	Concern
Declined Significantly	Acceptable	Issue	Issue	Concern	Concern

Similarly, each of the seven categories of measures is given an evaluation that is based on an average of the overall evaluation for each

measure within the category. This results in one of the following category evaluations:

- Excellent (blue)
- Good (green)
- Acceptable (yellow)
- Issue (orange)
- Concern (red)

Example of measure and category evaluations:

Category	Measure	Evaluations			Category
		Achievement	Improvement	Overall	
Student Learning Achievement: Grades 10 – 12	Diploma: Acceptable	Declined	Intermediate	Issue	Acceptable
	Diploma: Excellence	Improved	High	Good	
	Rutherford Scholarship Eligibility Rate	Maintained	High	Good	

Jurisdiction Results and Evaluations

NEW

Alberta Education calculates and provides the results, prior three-year averages and evaluations of the Accountability Pillar measures and categories to school jurisdictions twice a year on the Extranet: in May for use in the three-year plan and an update in September when the new year of achievement test and diploma exam results are available, for use in the AERR.

Jurisdiction and Alberta Education Review and Follow-up

NEW

The evaluation of the measures provides a consistent and transparent framework for interpreting results and helps jurisdictions identify areas needing improvement. Jurisdictions are required to address their low and declining measure results in their three-year plans, taking into account the factors affecting performance resulting from data and contextual analysis. For measures with an **overall** evaluation of "Issue" or "Concern", jurisdictions are required to include and clearly identify strategies in their plans that will improve results over time, as well as three-year targets for these measures.

The Accountability Pillar Evaluation Report provides a starting point for jurisdictions to understand their performance on the Accountability Pillar.

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- Excellent (blue)
- Good (green)
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- Concern (red)

Example of measure and category evaluations:

Category	Measure	Evaluations			
		Achievement	Improvement	Overall	Category
Student Learning Achievement: Grades 10 – 12	Diploma: Acceptable	Declined	Intermediate	Issue	Acceptable
	Diploma: Excellence	[illegible]	High	Good	
	Rutherford Scholarship Eligibility Rate	Maintained	High	Good	

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Alberta Education calculates and provides the results, prior three-year averages and evaluations of the Accountability Pillar measures and categories to school jurisdictions twice a year on the Extranet: in May for use in the three-year plan and an update in September when the new year of achievement test and diploma exam results are available, for use in the AERR.

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The Accountability Pillar Evaluation Report provides a starting point for jurisdictions to understand their performance on the Accountability Pillar

measures. Jurisdictions are expected to apply their expertise in data and program analysis as well as their knowledge of local conditions and context to provide a fuller understanding and to determine how best to bring about improvement.

Alberta Education staff will continue to meet with jurisdiction staff and review jurisdiction three-year education plans and AERRs annually. These reviews will include looking at Accountability Pillar measure results and evaluations. Alberta Education plans to work with jurisdictions on a priority basis, especially when category evaluations drop to or remain at the "Issue" or "Concern" level.

The annual analysis of school board plans and annual analysis of school board AERRs prepared and distributed by Alberta Education will be replaced, starting in 2007, with a single document on both three-year education plans and AERRs that contains information to help jurisdictions:

- develop effective strategies that foster high achievement and/or improvement in Accountability Pillar measures
- analyze and address factors affecting low or declining performance on Accountability Pillar measures.

In addition, work is underway to enhance the assistance available from the department, including the following:

1. Alberta Education is researching and compiling reference materials on selected topics that focus on effective practices for improving results, which will be available to school jurisdictions.
2. Alberta Education will help jurisdictions with low or declining results get in touch with jurisdictions with high or improving results to discuss effective practices, upon request.
3. Alberta Education will be calculating the student outcome measures (high school completion, dropout, post-secondary transition and Rutherford eligibility rates) at the school level and for specific populations of students in future years, e.g., special needs, ESL, FNMI.

Assistance with improvement efforts may also be available from sources such as Regional Consortia, Faculties of Education and the professional associations, e.g., ASBA, ATA, CASS, upon request.

Accountability Pillar Evaluation Implementation Timeline

The Accountability Pillar report provided to each jurisdiction in May and October 2006 contains evaluations for the required measures, except for survey measures. Four years of results are needed to evaluate a measure, which will not be available for these measures until 2007. The first complete Accountability Pillar evaluation will be provided to jurisdictions in May 2007.

A website for additional information on the Accountability Pillar is under development.

Section

2

Education Plans for School Jurisdictions

An Overview of the Process

Preparing Education Plans

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The education plans prepared by school jurisdictions and schools encompass a three-year cycle. These are updated each year and aligned with Alberta Education's three-year business plan. As one year is completed, another is added. At the same time, strategies and priorities are adjusted in response to performance results, the Accountability Pillar evaluation and changes in the operating environment. This approach allows school jurisdictions to be responsive to students and community needs while focusing on continuous improvement and maintaining continuity from year to year.

The school board or francophone school authority is accountable for the plan. The elected board provides overall direction for the education plan. In consultation with parents, jurisdiction and school staff and other stakeholders in their community, the jurisdiction administration develops a planning process that meets jurisdiction needs and is responsible for preparing the content of the plan for approval by the board.

Schools plan and implement three-year education plans aligned with school jurisdiction and provincial direction. Education plans for schools are developed by school administrators and teaching staff, in consultation with school councils and jurisdiction staff.

Updating Education Plans

School jurisdictions and schools update their three-year education plans each year. Annual updates take the following considerations into account:

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- Jurisdiction and school results and evaluations of Accountability Pillar measures and categories

- Input from stakeholders such as school councils, students, parents and the public
- Available resources
- Alberta Education's annual three-year business plan and performance results
- Feedback from Alberta Education.

Although entirely new plans are prepared infrequently, components such as strategies and three-year targets are updated each year, and components such as the vision, mission and beliefs (foundation statements) should be revisited and refreshed on a regular basis. Such reviews are particularly appropriate when a new board begins its term.

Communicating Education Plans

Three-year education plans are public documents. School jurisdictions are required to post their plans on their websites, including subsequent amendments or updates. They are also encouraged to use a variety of methods to communicate their plans and their achievements to the broader community, such as newspaper inserts, brochures, jurisdiction report cards and community meetings.

Submitting Education Plans

School jurisdictions submit their updated three-year plans to Alberta Education by sending an email to the respective zone director, advising that the plan has been posted to the jurisdiction's website along with the web-link to the plan. If plans are revised after submission, advise the zone director by email of the changes and the posting of the revised plan.

Due Dates

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Three-year education plans for school jurisdictions are due by May 31 each year (extended to June 23, 2006 for the 2006-09 plan). Plans must be posted on the jurisdiction's website by this date, and the department must be notified of this posting (i.e., by email to your zone director).

Reviewing Education Plans

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Alberta Education staff review three-year education plans to:

- enhance the department's understanding of the jurisdiction's context;
- identify ways the department can support jurisdiction improvement efforts;

- monitor compliance with provincial requirements; and
- identify implications for provincial planning.

The Components and Requirements of Education Plans 2006-2009

[Components are required unless otherwise identified. Components are defined in Appendix D, pages 12-13]

Education plans for 2006/07 – 2008/09 include the following components:

- A **message** from the board chair (optional).
- An **accountability statement**, worded as follows:

  The Education Plan for (name of jurisdiction) the three years commencing September 1, (year) was prepared under the direction of the Board in accordance with the responsibilities specified in the *School Act*, the *Government Accountability Act*, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. This Education Plan was developed in the context of the provincial government's business and fiscal plans. The Board is committed to achieving the results laid out in this plan.

- Information on how the plan was or will be communicated to parents and the public. Also include a link to the plan posted on the jurisdiction's website.
- **Foundation statements** (optional), i.e. vision, mission, principles and beliefs that articulate the jurisdiction's values and purpose. If included, these are consistent with the corresponding statements in Alberta Education's business plan.
  - **Vision:** describes a possible and desired future state that the jurisdiction strives to achieve; it focuses on student achievement and programs or services that maximize student learning.
  - **Mission:** provides a clear, concise description of the jurisdiction's purpose and role.
  - **Principles and beliefs:** provide statements of the principles and beliefs that guide the jurisdiction's decision-making.
- A **profile of the jurisdiction** (optional). Profiles include information about the jurisdiction, such as:

- characteristics of communities and students
- education programs
- schools (size, location and other details)
- planning environment, including emerging trends and issues that affect operations.

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- **Provincial goals, related outcomes, performance measures, targets and strategies.** Include the May 2006 Accountability Pillar Overall Summary provided by Alberta Education, which contains the evaluation for each measure and category. Required goals, outcomes and performance measures are listed on page 2-5.

  For each required outcome, include:

  - Local strategies (at least one strategy for each outcome in the plan), including strategies that address learning needs and achievement of outcomes for all students and address local context and specific student populations and needs. Jurisdictions are required to include and clearly identify (e.g., highlight) strategies in their plans that address low or declining results (i.e., any measure with an overall evaluation of "Issue" or "Concern").
  - Required measures and last actual result (see list on page 2-5); additional local measures optional.
  - Improvement targets for the third year of the plan for Accountability Pillar measures with an overall evaluation of "Issue" or "Concern" that reflect improvement over current results, as defined by the evaluation methodology. A table indicating the amount of increase required for improvement on each measure based on the chi-square calculation will be provided to each jurisdiction to assist with setting improvement targets. (Targets are optional but very useful for other measures where results over time are available.)

  Additional local goals, outcomes and performance measures (optional) to address local needs and circumstances, as appropriate. For each local goal, include at least one outcome as well as strategies and performance measures.

Required Goals, Outcomes and Performance Measures

Listed below are all the required goals, outcomes and performance measures for school jurisdiction three-year education plans for 2006/07 to 2008/09. Three-year targets are required for Accountability Pillar measures with an evaluation of "Issue" or "Concern." Measures that are not part of the Accountability Pillar are shaded. Survey measures consist of a number of questions for each respondent group.

Categories	Goals, Outcomes and Performance Measures
Safe and Caring Student Learning Opportunities	**Goal One: High Quality Learning Opportunities for All** **Outcome: Schools provide a safe and caring environment for students.** • Percentage of teacher, parent and student agreement that: students are safe at school, are learning the importance of caring for others, are learning respect for others and are treated fairly in school. **Outcome: The education system meets the needs of all K-12 students, society and the economy.** • Percentage of teachers, parents and students satisfied with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. • Percentage of teachers, parents and students satisfied with the overall quality of basic education. • Percentage of teachers, parents and students satisfied with access and timeliness of services for students in schools (e.g. academic counselling, career counselling, library services, supports for students with special needs). (Clarified wording). **Outcome: Children at risk have their needs addressed through effective programs and supports.** • Annual dropout rate of students age 14 to 18. **Outcome: Students complete programs.** • Percentages of students who completed high school within **three** years of entering Grade 10 (note change in bold).
Student Learning Achievement, K-9 Student Learning Achievement, 10-12 Preparation for Life Long Learning, Employment, and Citizenship	**Goal Two: Excellence in Student Learning Outcomes** **Outcome: Students demonstrate high standards.** • Percentages of students who achieve the acceptable standard, and the percentages who achieve the standard of excellence on Grades 3, 6 and 9 Provincial Achievement Tests (cohort results). • Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations. • Diploma examination participation rates (under development) - REVISED. • Percentages of Grade 12 students meeting Rutherford Scholarship eligibility criteria. **Outcome: Students are well prepared for lifelong learning.** • High school to post-secondary transition rate within **four** years of entering Grade 10 (note change in bold). **Outcome: Students are well prepared for employment.** • Percentages of teachers and parents who agree that students are taught attitudes and behaviours that will make them successful at work when they finish school. **Outcome: Students model the characteristics of active citizenship.** • Percentages of teachers, parents and students who are satisfied that students model the characteristics of active citizenship.
Involvement Continuous Improvement	**Goal Three: Highly Responsive and Responsible Jurisdiction** **Outcome: The jurisdiction demonstrates effective working relationships with partners and stakeholders.** • Percentage of teachers and parents satisfied with parental involvement in decisions about their child's education. **Outcome: The jurisdiction demonstrates leadership and continuous improvement.** • Percentages of teachers and parents indicating that their school and schools in their jurisdiction have improved or stayed the same the last three years. • Percentages of teachers who agree that professional development opportunities made available through the school jurisdiction are focused on jurisdiction priorities, effectively address their ongoing professional development needs, and contribute significantly to their professional growth (clarified wording).

Notes:

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- Results for required performance measures by school and by specific populations of students will be provided by Alberta Education in future years to assist in jurisdiction improvement efforts.

- **Budget highlights.** This section presents highlights from the board's budget for the first year of the three-year plan in a way that is easily understood, transparent and meaningful to the public. Budget highlights must provide key financial information about the upcoming school year, focusing on anticipated material changes from the current year. This section may refer to budgeted changes in enrolment, certificated and un-certificated staff, programs, funding, revenues and expenses, annual surpluses or deficits and accumulated surpluses. This section must include:
  - Guiding principles the board uses in financial planning.
  - Charts/tables that summarize information from the board's budget.
  - A web-link to the jurisdiction's Budget Report Form.

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- **Highlights of facility and capital plans.** Include:
  - A brief description of major school renewal or construction projects underway or planned over the next three years (if applicable) and their benefit to students *(which students, programs, schools).*
  - A web-link to more detailed information on the jurisdiction's facility and capital plans.

An optional format is provided in Appendix A (pages 2 - 6) that includes all the required elements of the school board plan.

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Requirements for School Education Plans 2006-2009

A school's education plan reflects and is aligned with the jurisdiction's three-year plan. Each jurisdiction outlines its own requirements for the content and format for school plans. In addition, the provincial goals and measures listed below are required in school plans. Although Alberta Education does not routinely collect or review individual school plans, the department stipulates the following requirements to ensure consistency among school, jurisdiction and ministry plans. It is the responsibility of school jurisdictions to ensure that these requirements are met:

- Every school must prepare a three-year education plan that identifies goals, outcomes, strategies and performance measures.
- School plans must include the goals of the Alberta Education business plan, strategies for achieving the goals and performance measures for assessing achievement, including required measures (including the most recent school, jurisdiction and provincial results) specified for Goal Two, below.
  - Goal One: High quality learning opportunities for all
  - Goal Two: Excellence in student learning outcomes
    - Percentages of all students in Grades 3, 6 and 9 who achieve the acceptable standard and the percentages who achieve the standard of excellence on provincial achievement tests (the cohort).
    - Participation rates in provincial achievement tests.
    - Percentages of students who achieve the acceptable standard and the percentages who achieve the standard of excellence on diploma examinations.
    - Diploma examination participation rates (under development).

      Notes:

      - The information for these measures is available to schools on the Alberta Education Extranet.
      - Targets, while useful for measures where results over time are available, are not required.
      - Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.

- School level results for high school completion, dropout, Rutherford Scholarship eligibility, post-secondary transition and diploma exam participation rates are under development and will be provided to schools on the Extranet when available.

– Goal Three: Highly responsive and responsible school

In addition:

- School councils must have the opportunity to participate in the development of the school's three-year education plan, including input on strategies.
- School plans must describe how the school council was involved in the development of the plan.

Section

3

Results Report

An Overview of the Process

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Preparing Results Reports

Each year, school jurisdictions measure and interpret their performance and report on their progress toward achieving the goals and outcomes of their three-year education plans in their Annual Education Results Report (AERR). This includes measuring and reporting on local measures and reporting and responding to the measurement information and evaluations received from Alberta Education. The Accountability Pillar performance measure results and evaluations are a primary source of information for assessing and reporting on performance, and are used along with jurisdiction information for determining where improvements are needed.

The AERR is prepared under the direction of the board, using a process determined by jurisdiction staff. The report is approved by the elected board or francophone authority and informs stakeholders where the jurisdiction is in relation to where it wants to be in achieving its goals and outcomes. It demonstrates that the school board is accountable for results and for the wise use of resources to provide quality programs for students and to address areas for improvements. AERRs provide jurisdictions and schools with the opportunity to summarize their accomplishments, in addition to reporting on performance.

In preparing their results reports, school jurisdictions compile and assess information that pertains to the performance measures identified in their three-year education plans. This information comes from:

- Alberta Education, which provides results and evaluations in a single report on the Extranet for the required measures, as follows:
  - Provincial surveys of students, parents and teachers.

- Results from provincial achievement tests and diploma examinations.
- Diploma examination participation rates.
- High school completion rates, dropout rates, high school to post-secondary transition rates and Rutherford Scholarship eligibility rates.

- Local sources (schools and jurisdictions) including locally developed surveys* used to collect information for optional local performance measures.

Reporting-Related Communications

Annual education results reports are public documents. School jurisdictions are required to post their AERRs on their websites. They are also encouraged to use tools such as newspaper inserts, brochures, jurisdiction report cards and community meetings to make the information more broadly accessible to parents and the public.

Reporting information that is summarized for public distribution must include results for all performance measures identified in the jurisdiction's three-year education plan.

A school jurisdiction's annual education results report must identify how the report was or will be communicated to the public. It must also indicate how the results reports prepared by schools in the jurisdiction are communicated to parents and to the community.

Submitting Results Reports

School jurisdictions submit their results reports to Alberta Education by sending an email to the respective zone director, advising that the report has been posted to the jurisdiction's website and providing the web-link to the report.

Due Dates

School jurisdiction annual education results reports are **due by November 30** of each year, for the previous school year. The reports

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* To support school jurisdictions in their local efforts to survey stakeholders, Alberta Education prepared a useful handbook, *How to Conduct Satisfaction Surveys: A Practical Guide to Conducting Surveys within Alberta's Education System*. The handbook can be downloaded from the department's website: http://www.education.gov.ab.ca/educationsystem/Satisfaction.

must be posted on the jurisdiction's website by this date, and the department notified of the posting by email to the zone director.

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Reviewing Annual Education Results Reports

Alberta Education staff review school jurisdictions' annual education results reports to:

- enhance the department's understanding of jurisdiction results;
- determine whether implications of results for the next update of the jurisdiction plan have been considered, e.g. how shortfalls in performance will addressed;
- monitor compliance with provincial requirements;
- ensure consistency with the related education plan;
- identify ways Alberta Education can support jurisdiction results reporting and improvement efforts; and
- identify implications for the department's planning and priorities.

The Components of Annual Education Results Reports for 2006/07 (due November 30, 2007)

[Components are required unless otherwise specified.]

Annual education results reports include the following components:

- A message from the board chair (optional)
- An accountability statement, worded as follows:

  The annual education results report for (name of jurisdiction) for the (year) school year was prepared under the direction of the board in accordance with the responsibilities specified in the *School Act*, the *Government Accountability Act*, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. The board is committed to using the results in this report, to the best of our abilities, to improve the quality of education for students in our jurisdiction. We will use the results to develop sound strategies for our three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.

- Information on how the report was or will be communicated to parents and the public.
- Information on how the results reports prepared by schools in the jurisdiction were or will be communicated to parents and to the community.

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- Highlights for the previous year, including:
  - the Accountability Pillar Overall Summary provided by Alberta Education in October.
  - the jurisdiction's **accomplishments** (impact of major activities/strategies), including programs and achievement of specific groups of students and web-links to the jurisdiction's AISI annual report and class size report.
- Report the jurisdiction's **performance measure results** in relation to the goals and outcomes of the three-year plan (see page 2-5 for list of required measures). For each Accountability Pillar measure, report results in relation to prior results and targets (if applicable). Specifically:
  - the five years of jurisdiction and provincial results (or available results if less than five years),

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  - progress toward the three-year target for any measures with an evaluation in 2006 of "Issue" or "Concern," as determined by the application of the Accountability Pillar evaluation methodology, and
  - comment on results, such as contextual information, factors affecting performance and analysis of results.

Notes:

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.
- For Accountability Pillar survey measures, results from the Accountability Pillar survey reports, rather than the jurisdictions own surveys, must be reported. Jurisdiction survey results may be used to report on local measures.
- Results by school and by specific student populations, e.g., ESL, FNMI, special needs, will be calculated and provided to school jurisdictions in future years.

- Identify **future challenges**, including areas for improvement and how the jurisdiction will address these.

- **Summary of Financial Results:**
  - provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus, and capital reserves;
  - include program expenditure information in a table or graph format for the primary audience – parents and other members of the community;
  - indicate where more information on the jurisdiction's sources of school generated funds and their uses can be obtained (e.g. link to the Audited Financial statements, contact at central office) and that comparative information is available in a provincial report – provide the web-link to the provincial roll up of jurisdiction AFS information: http://www.education.gov.ab.ca/funding/afs/;
  - provide a web-link to the jurisdiction's 2006/07 Audited Financial Statement.

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- **Capital and Facilities Projects:**
  - highlight for parents and the public progress on major school facilities projects, i.e., building renewal and construction for the previous school year, as applicable, focusing on benefits to students, e.g., improved accommodation of students, enhanced learning opportunities *[which students, programs, schools]*.

    Note: A template for the AERR is under development and will be posted when available.

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Requirements for School Results Report on the 2006/07 School Year

A school's annual education results report is closely aligned with the AERR prepared by the jurisdiction. Each jurisdiction establishes requirements for the content and process for school annual reports. In addition, the elements listed below are required by Alberta Education, to ensure alignment at all levels – school, jurisdiction and provincial.

Alberta Education does not routinely collect or review the annual results reports prepared by individual schools. It is the responsibility of school jurisdictions to ensure that the following school reporting requirements are met. A school report must include:

- Results information related to *all* the goals, outcomes and performance measures – both local and provincial – identified in the school's education plan, including the following four measures required by the department for the provincial goal – Excellence in student learning outcomes:
  - Percentages of all students in Grades 3, 6 and 9 who achieve the acceptable standard and percentages who achieve the standard of excellence on provincial achievement tests (the cohort).
  - Participation rates in provincial achievement tests (PATs) for Grades 3, 6 and 9.
  - Percentages of students who achieve the acceptable standard and percentages who achieve the standard of excellence on diploma examinations.
  - Participation rates of diploma examinations (under development).
- School results reporting for the four required provincial measures must include:
  - an assessment of progress in relation to past performance
  - five years of school results in relation to comparable provincial and jurisdiction results.

  Notes:
  - Schools can access the information they need for student achievement and participation rates on the Alberta Education's Extranet.
  - Reporting achievement test results for writers is optional.
  - Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.

- A web-link to the school's class size report on the jurisdiction's website.
- Additional information, as required by the school jurisdiction.

Appendix

Requirements and Sample Format for School Board Plans

The list below and format that starts on the next page contain the requirements for education plans for 2006/07 – 2008/09. School jurisdictions may wish to use this information as a checklist, even if they choose to use a format of their own design. All elements are required, unless otherwise identified.

- ❒ **Message from the Board Chair** (optional).
- ❒ **Accountability Statement. Must be phrased as follows:**

  The **(jurisdiction's name)** education plan for the three years commencing September 1, **(year)** was prepared under the direction of the board in accordance with responsibilities specified in the *School Act*, the *Government Accountability Act*, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. The priorities outlined in this education plan were developed in the context of the provincial government's business and fiscal plans and Alberta Education's business plan. The board is committed to achieving the results laid out in this education plan.

- ❒ **Publication.** School jurisdictions must post their education plans on their websites by May 31st (for this year, extended to June 23, 2006) and indicate how the education plan was or will be communicated to the public.
- ❒ **Foundation Statements** (optional). Vision, mission, principles and beliefs.
- ❒ **A Profile of the Jurisdiction** (optional).
- ❒ **Accountability Pillar Overall Summary.**

- ❒ **Goals, Outcomes, Strategies, Performance Measures and Targets.** See sample layout starting on the next page that shows the goals, outcomes, performance measures and targets that must be included in the education plan for 2006/07 – 2008/09. See chart on page 2-5 for an at-a-glance list of performance measures required by Alberta Education. Alberta Education provides a report to school jurisdictions in May that contains the Accountability Pillar results and evaluations for jurisdictions to use in finalizing their plans.

  Note: Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.

- ❒ **Clearly identify (e.g., highlight) strategies to improve results on any measure with an overall evaluation of "Issue" or "Concern".**

- ❒ **For provincial goals and outcomes, identify local strategies.** Additional local outcomes and performance measures (optional).

- ❒ **Budget Highlights.**

- ❒ **Highlights of capital and facilities plans.**

Goal One: High Quality Learning Opportunities for All
Outcome: Schools are safe and caring.

Performance Measures	Last Actual	Previous Year's Result
• Teacher, parent, and student agreement that students are safe at school, learning the importance of caring for others, learning respect for others, and are treated fairly at school.		
Strategies		

Outcome: The education system meets the needs of all K-12 students, society and the economy.

Performance Measures	Last Actual	Previous Year's Result
• Teacher, parent, and student satisfaction with the opportunity for students to receive a broad program of studies, including fine arts, career, technology, and health and physical education. • Teacher, parent and student satisfaction with the overall quality of education in Alberta. • Teacher, parent and student satisfaction with access and timeliness of services for students in schools.		
Strategies		

Outcome: Children at risk have their needs addressed through effective programs and supports.

Performance Measures	Last Actual	Previous 3-yr Avg.	Evaluation			Improvement Targets 2008/09*
			Achievement	Improvement	Overall	
• Annual dropout rate of students aged 14 tr[illegible]3.						
Strategies						

Outcome: Students complete programs.

Performance Measures	Last Actual	Previous 3-yr Avg.	Evaluation			Improvement Targets 2008/09*
			Achievement	Improvement	Overall	
• High school completion rate of students within three years of entering Grade 10						
Strategies						

Note: Shaded measures are required but are not part of the Accountability Pillar.

* Three-year improvement targets required for measures with an overall evaluation in May 2006 of "Issue" or "Concern."

Goal Two: Excellence in Student Learning Outcomes
Outcome: Students demonstrate high standards.

Performance Measures	Last Actual	Previous 3-yr Avg.	Evaluation			Improvement Targets 2008/09*
			Achievement	Improvement	Overall	
• Percentage of students in Grades 3, 6 and 9 who achieved the acceptable standard on provincial achievement tests.**						
• Percentages of students in Grades 3, 6 and 9 who achieved the standard of excellence on provincial achievement tests.						
• Percentage of students who achieved the acceptable standard on diploma examinations.**						
• Percentage of students who achieved the standard of excellence on diploma examinations.						
• Diploma examination participation rate.						
• Percentage of Grade 12 students meeting Rutherford Scholarship eligibility criteria.						
Strategies:						

Outcome: Students are well prepared for lifelong learning.

Performance Measures	Last Actual	Previous 3-yr Avg.	Evaluation			Improvement Targets 2008/09*
			Overall	Achievement	Improvement	
• High school to post-secondary transition rate within four years of entering Grade 10.						
Strategies						

* Three-year improvement targets required for measures with an overall evaluation in May 2006 of "Issue" or "Concern."

** The percentages achieving the acceptable standard include the percentages achieving the standard of excellence.

Outcome: Students are well prepared for employment.

Performance Measures	Last Actual	Previous Year's Result
• Teacher and parent agreement that students are taught attitudes and behaviours that will make them successful at work when they finish school.		
Strategies		

Outcome: Students model the characteristics of active citizenship.

Performance Measures	Last Actual	Previous Year's Result
• Teacher, parent and student agreement that students model the characteristics of active citizenship.		
Strategies		

Goal Three: Highly Responsive and Responsible Jurisdiction
Outcome: The jurisdiction demonstrates effective working relationships with partners and stakeholders.

Performance Measures	Last Actual	Previous Year's Result
• Teacher and parent satisfaction with parental involvement in decisions about their child's education.		
Strategies		

Outcome: The jurisdiction demonstrates leadership and continuous improvement.

Performance Measures	Last Actual	Previous Year's Result
• Percentage of teachers and parents who indicate that their school and schools in their jurisdiction have improved or stayed the same in the last three years.		
• Percentages of teachers who agree that professional development opportunities made available through the school jurisdiction are focused on jurisdiction priorities, effectively address their ongoing professional development needs, and contribute significantly to their professional growth.		
Strategies		

Budget Highlights

Highlights of Facility and Capital Plans

Note: Shaded measures are required but are not part of the Accountability Pillar.

Revised Reporting Requirements for the November 2006 AERR

For November 2006 AERR based on 2005/06 school year (revisions are shaded)

The 2006 Annual Education Results Report includes the following components:

- A **message** from the board chair (optional).
- An **accountability statement**, worded as follows:

  The annual education results report for **(name of jurisdiction)** the **(year)** school year was prepared under the direction of the board in accordance with the responsibilities specified in the *School Act*, the *Government Accountability Act*, Alberta Education Policy 2.1.1 ("Accountability in Education: School Authority Accountability") and the provincial government's accounting policies. The board is committed to using the results in this report, to the best of our abilities, to improve the quality of education for students in our jurisdiction. We will use the results to develop sound strategies for out three-year education plan to ensure that all our students can acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society.

- Information on how the report was or will be communicated to parents and the public.
- Information on how the results reports prepared by schools in the jurisdiction were communicated to parents and to the community.
- Highlights for the previous year, including:

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  - The Accountability Pillar overall summary report as provided by Alberta Education in October 2006.

- the jurisdiction's **accomplishments** (impact of major activities/strategies), including programs and achievement of specific groups of students and web-links to the jurisdiction's AISI annual report and class size report.

- Report the jurisdiction's **performance measure results** from the jurisdiction's education plans for 2005/06 – 2007/08 in relation to the goals, outcomes and targets for 2005/06 in the three-year plan (see page 2-5 for list of required measures).

- Specifically, for each required measure, report:

  - five years of jurisdiction and provincial results (or available results if less than five years),

  - 2005/06 result in relation to the target for that year (if applicable), and,

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  - comment on results, such as contextual information, factors affecting performance and analysis of results.

Notes:

- Consistent with the *Freedom of Information and Protection of Privacy Act*, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.

- For Accountability Pillar survey measures, results from the Accountability Pillar Survey, rather than the jurisdiction's own surveys, must be reported. Jurisdiction survey results may be used to report on local measures.

- Identify **future challenges**, including areas for improvement and how the jurisdiction will address these.

- **Summary of Financial Results**

  - provide key financial information about the school year, such as significant changes over the prior year, the annual operating surplus or deficit, accumulated operating surplus and capital reserves;

  - include program expenditure information in a table or graph format for the primary audience – parents and other members of the community;

  - indicate where more information on the jurisdiction's sources of school generated funds and their uses can be obtained (e.g. web-link to the Audited Financial Statements, contact at central office) and that comparative information is available in a provincial report

– provide the web-link to the provincial roll up of jurisdiction AFS information: http://www.education.gov.ab.ca/funding/afs/ ;

– provide a web-link to the jurisdiction's Audited Financial Statement for 2005/06.

- **Capital and Facilities Projects**

  – highlight, for parents and the public, progress on major school facilities projects, i.e., building renewal and construction for the previous school year, as applicable, focusing on benefits to students, e.g., improved accommodation of students, enhanced learning opportunities *[which students, programs, schools].*

Note:
A template for reporting results online is under development. In the meantime, boards have the following options:

- use the Accountability Pillar report provided by Alberta Education as an appendix to their AERR and provide the additional required information, i.e., targets and commentary on results, in the main part of the AERR using a format of their choosing, or
- copy and paste from the Accountability Pillar report into their own document, or
- use the interim AERR template that is being prepared and will be posted on the planning resources web page when available: http://www.education.gov.ab.ca/educationsystem/planning.asp. Jurisdictions will be notified of the posting.

Reporting Requirements for School Annual Education Results Report on the 2005/06 School Year

Schools assess and report annually to their board, parents and their communities on student achievement and use of resources. The reports include the results information in relation to all goals, outcomes and performance measures in the school's plan, including required provincial student achievement measures. School reports also include specific elements required by the board.

Required measures:

School reports must report on the required provincial measures listed below – student results on provincial achievement tests and diploma examinations – for the education system goal, excellence in student learning outcomes, and include an assessment of their results.

- Percentages of students in Grades 3, 6 and 9 who achieved the acceptable standard, and the percentages who achieved the standard of excellence on provincial achievement tests (five years of results), in relation to jurisdiction and provincial result, and the current year results in relation to school, jurisdiction and provincial targets for 2005/06 (cohort results).
- Percentages of students in Grades 3, 6 and 9 writing provincial achievement tests (five years of results) in relation to jurisdiction and provincial participation rates for each test.
- Percentages of students writing Grade 12 diploma examinations who achieved the acceptable standard, and the percentages who achieved the standard of excellence (five years of results) in relation to jurisdiction and provincial results for each examination.
- Student participation in diploma examination courses in relation to jurisdiction and provincial participation rates (five years of results) – participation rate under development.

In addition, schools are required to:

- report on all measures and targets in their plans;
- include any other information required by their board;
- include a web-link to the school's class size report on the jurisdiction's website.

Notes:

- Reporting provincial achievement test results for writers is optional.
- Consistent with the Freedom of Information and Protection of Privacy Act, when the number of students or survey participants in a group is less than six, data must not be reported to protect individual privacy.

Appendix

C

References

Source material for this guide

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Appendix

D

Glossary of Planning and Accountability Terms

Accountability: An obligation to answer for assigned responsibilities, e.g., for use of funds, results achieved and for taking action to make continuous improvement and achieve desired results.

Continuous Improvement: Using performance results to adjust strategies and practices so that improvement in performance is achieved over time.

Goals: Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. Goals are typically expressed as desired conditions or aims.

Issues: An issue is a condition that may affect the organization's ability to fulfill its mandate or achieve its goals.

Mission Statement: A mission statement is a clear, concise description of a school jurisdiction's overall purpose and role. It gives direction to the programs and services that the jurisdiction provides for its students.

Outcomes: Outcomes are measurable statements of what school jurisdictions and schools seek to achieve. In broad terms, they answer the question, "What will this look like when we get to where we want to be?"

Performance Measures: Performance measures provide information on important, quantifiable aspects of the education system. They enable jurisdictions to assess progress toward achieving goals and outcomes.

Principles and Beliefs: Principles and beliefs guide decision-making and provide a foundation for developing mission, vision and goals.

Profile: A profile is a brief description of the school jurisdiction or school that gives context for the plan. Profiles include characteristics of communities, students, programs and location.

Strategies: Strategies are actions that school jurisdictions and schools take to achieve goals and desired outcomes that meet the needs of all

their students. They address local circumstances, issues, trends and opportunities.

Targets: Targets show desired levels of performance to be attained by a certain time. Targets are expressed quantitatively.

Trend: A trend shows a direction of data over time, e.g., enrolment growth.

Vision: A vision describes a possible and desired future state for the organization, grounded in reality, which inspires and guides decisions and actions.

NEW

Terms Related to the Accountability Pillar Evaluation

(in logical, rather than alphabetical order)

Accountability Pillar: The Accountability Pillar is one of the three pillars of the Renewed Funding Framework and enhances school jurisdiction accountability for results in return for greater flexibility in the allocation of resources. The Accountability Pillar places increased emphasis on the achievement of specific outcomes by evaluating and reporting results on a common set of measures, and where results are low or declining, taking action to improve student programs and results in subsequent years. The focus of the Accountability Pillar is on improving school jurisdiction results.

Accountability Pillar Performance Measures: The Accountability Pillar performance measures are a required, consistent set of measures, each of which is calculated on a comparable basis for all jurisdictions. School jurisdictions are required to include this common set of performance measures in their plans and report the results and evaluations for these measures in their Annual Education Results Reports. The measures draw from various kinds of data, including:

- Results of provincial testing programs,
- Student outcomes, such as drop out and high school completion rates, and
- Student, parent and teacher perceptions.

Category: Accountability Pillar measures are grouped into seven categories that represent key aspects of education that are important to parents and the public:

- Safe and caring schools,
- Student learning opportunities,
- Student learning achievement (Grades K to 9),
- Student learning achievement (Grades 10 to 12),
- Preparation for lifelong learning, employment and citizenship,
- Parental involvement, and
- Continuous improvement.

Evaluation Methodology: The evaluation methodology has been developed which assesses each measure in the Accountability Pillar in terms of achievement and improvement, then combines the achievement and improvement evaluations to calculate overall evaluations for measures and categories.

Achievement Evaluation: The Achievement evaluation is based on comparing the current jurisdiction result against a set of provincial standards that are expected to be fixed for 7 – 10 years. The achievement evaluation results in one of the following five achievement levels: Very High, High, Intermediate, Low, Very Low.

Standard: A standard is an established, quantifiable level of performance that is commonly understood and agreed upon, and is the basis for judging actual performance. The standards for each Accountability Pillar measure are calculated from baseline data (based on the distribution of results for all jurisdictions at a fixed point in time). The 5^{th}, 25^{th}, 75^{th} and 95^{th} percentiles of the distribution of the baseline results are used to establish the five achievement evaluation levels (listed above under "Achievement Evaluation").

Baseline: Baseline data constitute a starting point for comparisons of results against standards. Baseline data for each Accountability Pillar measure are established by averaging each jurisdiction's results across the three years to create a jurisdiction three-year average. The three years that form the baseline for calculating standards differ among measure types, depending on data availability:

- The baseline three-year average for student achievement measures (i.e., Provincial Achievement tests and Diploma Exams) uses data from school years 2001/02, 2002/03, and 2003/04.
- The baseline three-year average for the student outcome measures (drop out, high school completion, post-secondary transition and Rutherford Scholarship eligibility) uses data from the 2000/01, 2001/02 and 2002/03 school years.
- The baseline three-year average will be calculated for survey measures when the third year of results (2005/06) is available. Currently, only two years of jurisdiction level survey data are available (for the 2003/04 and 2004/05 school years).

Improvement Evaluation: The improvement evaluation focuses on improvement over time. Improvement is evaluated by comparing the jurisdiction's current result against the jurisdiction's previous three-year average using chi-square. (Chi square is a statistical test to determine the probability that there is no significant difference between an observed outcome and the expected outcome. In the case of the Accountability Pillar improvement evaluation, the chi square test is used to determine the probability that there is no significant difference between a jurisdiction's current result on a measure and its prior three-year average for that measure.) The improvement evaluation results in one of the following five improvement levels: Improved Significantly, Improved, Maintained, Declined, Declined Significantly.

Overall Measure Evaluation: Once the improvement and achievement levels have been calculated for a measure, an overall measure evaluation is calculated, which reflects both the achievement evaluation and the improvement evaluation. The overall measure evaluation is reported on a five point scale: Excellent, Good, Acceptable, Issue, Concern.

Category Evaluation: For each category of Accountability Pillar measures, the overall evaluations for each measure within that group are averaged to provide an evaluation for that category. The averaging is done by assigning the following numbers to the overall evaluation for each measure: Excellent: 2; Good: 1; Acceptable: 0; Issue: -1, and Concern: -2. These values are averaged and rounded to the nearest whole number. This result is then compared with the above list of assigned numerical values for each of the five evaluation ratings to determine the evaluation for the category.

Improvement/Decline: Improvement or decline for an Accountability Pillar measure is determined by comparing the current result against the previous three-year average using the chi-square test of statistical significance. Using the chi-square test:

- an **improvement or decline** occurs when the current result is at least one standard deviation above or below the previous three-year average, but less than two standard deviations.
- a **significant improvement or decline** (at the 5% level of confidence, or nineteen times out of twenty) occurs when the current result is approximately two or more standard deviations above or below the previous three-year average.

Improvement Target: Three-year improvement targets are set when the evaluation of results for a measure is "Issue" or "Concern". An improvement target must represent an increase that would lead to an evaluation of "Improved" based on the current result.